

ERMS 2019 upgrade

New Create Folder button

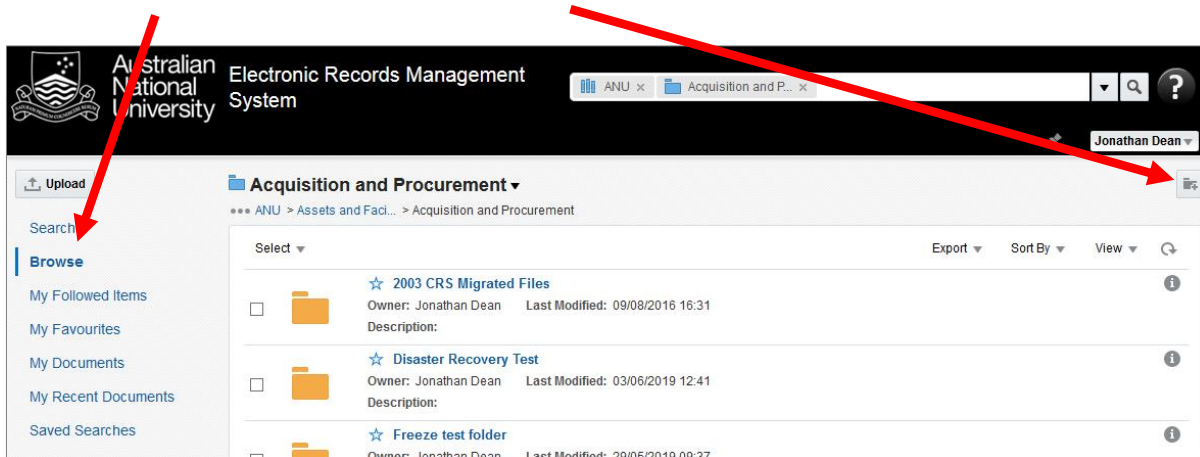
The new version of ERMS (Electronic Records Management System) offers new capabilities including an additional method for creating folders.

You can continue using the legacy method of creating new ERMS folders by clicking on Browse (left side of window), then right-clicking on a folder structure, then select the Create Folder option from the pop-up menu.



Using the new Create Folder button

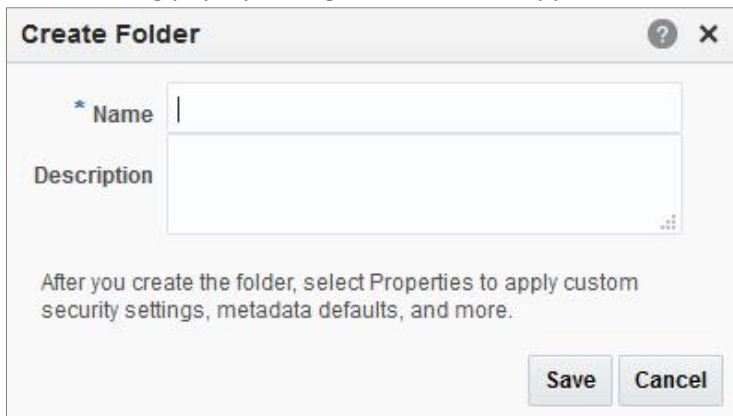
1. Click on Browse — the new Create Folder button appears in the top right hand of all Browse pages.



2. Select a folder (left side of window) in which to create the new folder, then click the new Create Folder button.



3. The following pop-up dialogue window will appear:

A screenshot of the 'Create Folder' pop-up dialog box. It has a title bar with a question mark and a close button. The dialog contains a text input field for '* Name' and a larger text area for 'Description'. Below the input fields, there is a note: 'After you create the folder, select Properties to apply custom security settings, metadata defaults, and more.' At the bottom, there are 'Save' and 'Cancel' buttons.

4. Type in a title for the new folder.
Note: when titling a folder, clear consistent titles help EMRS users retrieve information more easily — please use the guidelines provided in the [Folder Creation and Titling Guidelines](#).
5. Click on Save to create the new folder.

Choosing folder properties

1. Select the newly-created folder (below Browse menu), then right-click to see Folder Properties.
2. Select the Security tab.



Note: these are the security settings for the folder itself, determining who can see and access the folder. This can be done on an individual or group level. The settings can also be customised by the selection of **RWDA**, which determines the level of functionality available.

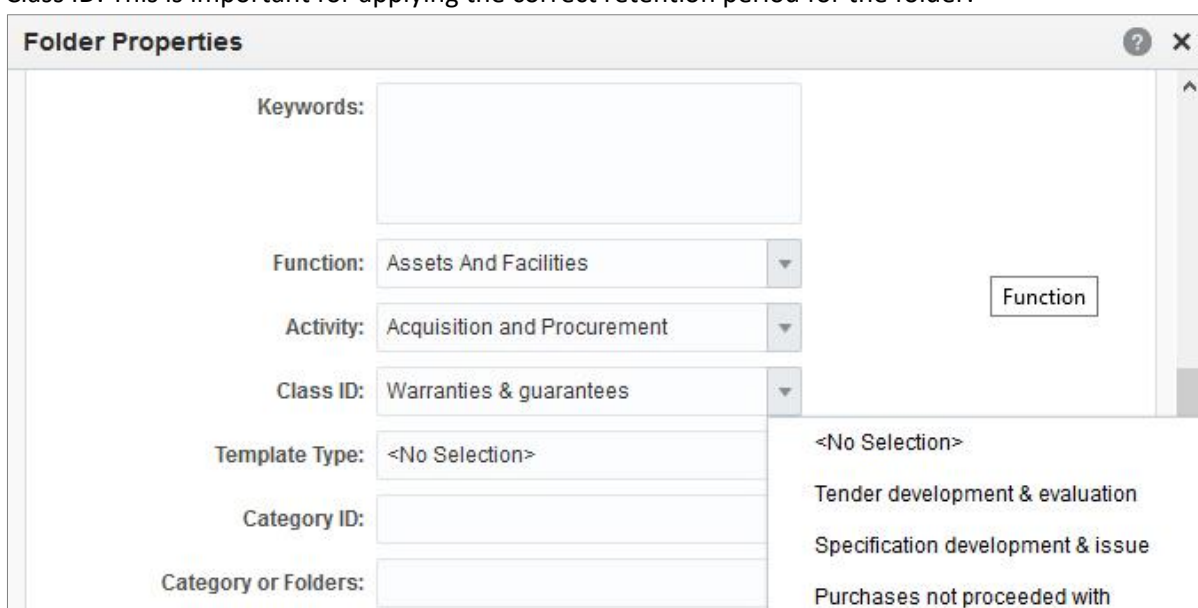
- R** Read only
- W** Add / edit documents in the folder
- D** Delete documents in the folder
- A** Administration which allows the folder settings to be modified

3. Click on the Metadata tab

Note: this tab controls the settings to be applied to documents registered into the folder.

4. Repeat the settings applied to the Individual and Group security fields from the Security tab
Note: verify that the Function and Activity fields have been applied, based on the folder location
5. If the folder has been created in an Activity folder, the Class ID will not have been set. To set Class ID, click on the pulldown menu and select the most appropriate option for the intended contents of the folder.

Note: if the folder is a sub-folder of a previously created folder, it should have inherited the parent Class ID. This is important for applying the correct retention period for the folder.



6. If the new folder is to have different security from the parent folder, click on the 'Inhibit Propagation of metadata values through this folder' button.

Note: this will stop changes in parent folders affecting the contents of the created folder.

7. Add any text to the Comments and Description fields that are desired
8. Click on Save to create the folder